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HRI Food Service Sector

Report

2004

Approved by:

Andrew C. Burst, Agricultural Counselor
U.S. Embassy

Prepared by:

Hassall & Associates

Report Highlights:

The food service sector in Australia was valued at US\$12.5 billion in 2000/01 (July/June). Australia's foodservice sector consists of three main sub-sectors - hotels and resorts; restaurants; and institutional contracts. The largest segment in the HRI sector is restaurants, valued at US\$3.7 billion or 30% of the industry total. The institutional segment remains below 25% of total retail value. In Australian dollars, all sub-sectors except 'other fast food/takeaways' experienced positive growth. Agents/distributors are the key to developing exports of U.S. food products to Australia.

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This report was drafted by consultants:

Hassall & Associates Pty Ltd
GPO Box 4625
Sydney, NSW 1044
Australia
Tel: +61-2-9241-5655
Fax: +61-2-9241-5684
Email: hassyd@ozemail.com.au
Web: www.hassall.com.au

Disclaimer: As a number of different sources were used in preparing this report, there are areas in which figures are slightly different. The magnitudes of the differences are, in most cases, small and the information is included to provide the U.S. exporter with the best possible picture of the Australian HRI food sector.



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INTRODUCTION

Americans and Australians have a warm relationship that spans the history of both nations. Australia and the United States share a common heritage, culture and language and have supported each other in every major international crisis of this century. Yet, despite friendship and close ties, most Americans do not know much about Australia. American television romanticizes Australia's vast continental landmass and unique wildlife, and its frontier/surfer/barbecue/sporting stereotypes. But few Americans know the real, contemporary Australia.

Australia is a prosperous, politically and economically stable, industrialized nation. It enjoys an enormous natural resource base of agriculture and minerals; a highly developed human resource base; modern legal and financial systems; and a physical and service infrastructure to support complex business and industry. Its state-of-the-art transportation and telecommunications systems (both internal and international) support a well-developed, economically diversified market. Per capita gross domestic product (GDP) is approximately US\$23,841, comparable to most industrialized western countries. The economy is growing steadily, inflation and interest rates are low and investment terms are competitive. The major concerns are a relatively high unemployment rate and a large external account deficit.

Australia is one of the most urbanized societies in the industrialized world, even though its land mass is the size of the continental United States. Of its 19.9 million people, more than 85 percent live in the large urban areas of Sydney, Melbourne, Adelaide, Brisbane and Perth, and in smaller cities and towns within 100 miles of the ocean. The center of the continent is flat, dry, mineral rich and largely unpopulated, while the coastal areas are wet, mountainous, and densely forested. The interior plains are rich and fertile, supporting great varieties of agriculture.

The society is increasingly multi-cultural, with the traditional Anglo-Celtic majority now joined by immigrants from Southern and Eastern Europe, the Middle East, Latin America and Asia, who are all making their cultural influences felt more vibrantly.

The Australian economy is enjoying a period of solid growth with low inflation. For the 2002 calendar year, real GDP grew 3.6 percent. Real GDP is likely to grow at a rate of around 2.5 percent in 2003. This lower rate of growth in 2003 is due to a major drought from late 2001 until early 2003 and a weak global economy. The consumer price index rose by 3.0 percent in 2002. A similar rate was registered for 2003.

The Australian dollar has appreciated against the U.S. dollar by approximately 30 percent over the past year. This situation provides U.S. exporters with an ideal opportunity to increase sales to Australia as imports from the U.S. are now much more affordable than in the recent past.

Finalization of a Free Trade Agreement between Australia and the U.S. would provide U.S. exporters with improved access to the Australian foodservice sector.

Australian/U.S. Dollar Exchange Rates

	1997	1998	1999	2000	2001	2002	2003
A\$/US\$	0.7374	0.6285	0.6440	0.5761	0.5128	0.5438	0.6312*

Source: Reserve Bank of Australia, www.rba.gov.au

* Preliminary

Note: These exchange rates were used to convert Australian dollars to U.S. dollars for 1997 to 2003 throughout this report.

SECTION I: MARKET SUMMARY

Australia's foodservice sector consists of three main sub-sectors - hotels and resorts; restaurants; and institutional contracts, hereafter referred to as HRI. The following provides a brief description and comparison of each sub sector.

Hotels and Resorts

- Clubs and hotels are the fourth most popular location for buying a meal, ranking behind fast food chains, restaurants and cafes.
- An increasing number of hotels and bars across Australia are serving food and in many cases patrons are looking for restaurant-quality food.
- The bistro is becoming more of a key component to hotels, due to restrictions placed on the level of gaming and also the reduction in smoking areas.

Restaurants and Cafes

- Fast food chains and takeaway outlets are the most popular locations for buying a full meal or snack. Restaurants are the second most frequently used outlet and cafes are the third.
- Large fast food chains are expected to increase turnover by nearly 6% annually over the next three years.
- There is a concentration of cafés and restaurant business in eastern Australian states (total 80%), with 38% operating in New South Wales (NSW), 25% in Victoria and 17% in Queensland. Similarly, the takeaway sub-sector has 80% of businesses located within NSW, Queensland and Victoria.

Institutional

- Five major players dominate the institutional sector, including the Compass Group, Qantas Airways, Spotless Group, Sodexo Australia and Delaware North.
- Caterers and food service contractors are concentrated in the eastern States (total 79%) with 38% operating in NSW, 23% in Victoria and 18% in Queensland.

HRI Food Service Sales and Growth Rates

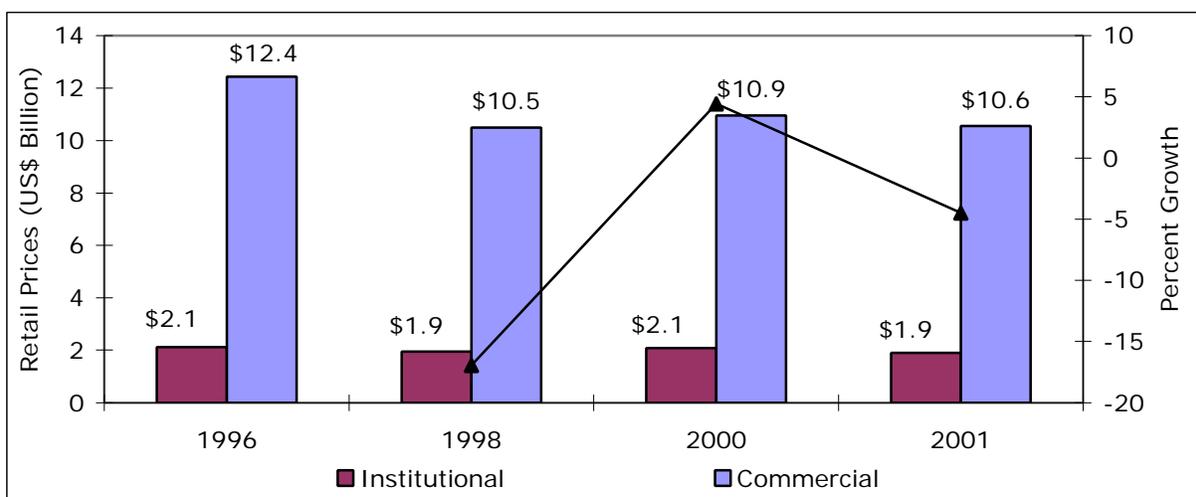
The food service sector in Australia was valued at US\$12.5 billion in 2000/01 (July/June). The largest segment in the HRI sector was restaurants, valued at US\$3.7 billion, or 30% of the industry total. The institutional segment remains below 25% of total retail value for all years. In Australian dollars, all sub-sectors except 'other fast food/takeaways' experienced positive growth; however, this trend does not exist after converting Australian dollars to U.S. dollars (Table 1).

Table 1: Foodservice Market at Retail Prices (US\$ million)

Outlet	1996	1998	2000	2001	Avg Annual Growth (%)
Institutional					
Institutional catering	628	691	922	923	11
Self - operated	1,491	1,257	1,152	974	-15
<i>Sub Total Institutional</i>	2,118	1,948	2,074	1,897	-4
Commercial					
Restaurants	3,845	3,268	3,860	3,692	-2
Cafes	863	817	1,037	1,077	6
Major Fast Food chains	2,432	2,011	1,959	2,000	-7
Other fast food & takeaways	3,060	2,200	1,786	1,692	-23
Hotels/motels/guest houses	1,177	1,131	1,152	1,026	-5
Clubs	785	754	749	667	-6
Caterers	275	314	403	410	12
<i>Subtotal commercial</i>	12,436	10,496	10,946	10,564	-6
Total Foodservice	14,554	12,444	13,020	12,461	-6

- When condensing the above information into institutional and commercial sectors, nominal growth for the foodservice industry in Australian dollars was positive for the period 1996 – 2001 (1996/98 – 6%, 1998/00 – 12% and 2000/01 – 7%). However when converted to U.S. dollars (Figure 1) negative growth characterizes 1996/98 and 2000/01.

Figure 1: Foodservice Market 1996 – 2001 (US\$ billion)



- The Australian foodservice market is emerging from two years of weak growth, which was largely the result of low consumer confidence.
- An increasing share of foodservice establishments is losing money. More than one in ten foodservice establishments suffered losses during 2002/03, with 46% of the industry having turnover of less than A\$500,000 per annum compared to 30% in 2001.

- Australians are eating out less. In 2002, the average Australian was eating out 83 times a year, compared with 94 times a year in 2000.
- Reasons people are dining out have changed. Three years ago, "convenience" was the main reason and now "special occasion", "break in routine" and "meeting friends" are the core motives.
- McDonalds is the leading fast food chain in Australia, followed by KFC (Kentucky Fried Chicken) and Hungry Jack's (Burger King).

Expected Growth Rates

- In 2001, the value of the Australian foodservice market was estimated at US\$12.3 billion and this figure is expected to grow to approximately US\$17.4 billion by 2011.
- Growth in the fast food and takeaway areas is expected to average 1.5% per annum in the period to 2005. However, major chains are expected to generate average annual growth of 5.7% through new marketing strategies, expansion into shopping centers, hospitals and convenience stores.

Number and Type of Foodservice Establishments by Sub-Sector

- In 2001, the food service market consisted of 78,743 outlets, 3.5% more than were recorded in the survey of 1999 (76,000). Of this total, 79% of outlets (61,991) were commercial (restaurants, hotels, fast-food chains, clubs and cafes), and the remaining 21% (16,752) were institutional (schools, hospitals and prisons) (Table 2).

Table 2: Number & Type of Food Service Establishments by Sub-Sector

Type of Outlet	Number of Establishments
Institutional	16,752
Commercial	61,991
TOTAL	78,743

- Within the commercial sector, there were 15,810 fast food outlets in 2001. Table 3 outlines changes in the number of major chain outlets versus other fast food outlets. Major chains have been steadily increasing while other fast food outlets have been declining over the past ten years.

Table 3: Fast Food Outlets in Australia in 2001

Year	Major Chains	Other	Total
1992	1,731	11,579	13,310
1994	2,045	12,900	14,945
1996	2,578	13,957	16,535
1998	2,727	13,732	16,459
2000	2,897	14,329	17,226
2001	3,160	12,650	15,810
2002	3,381	11,884	15,265

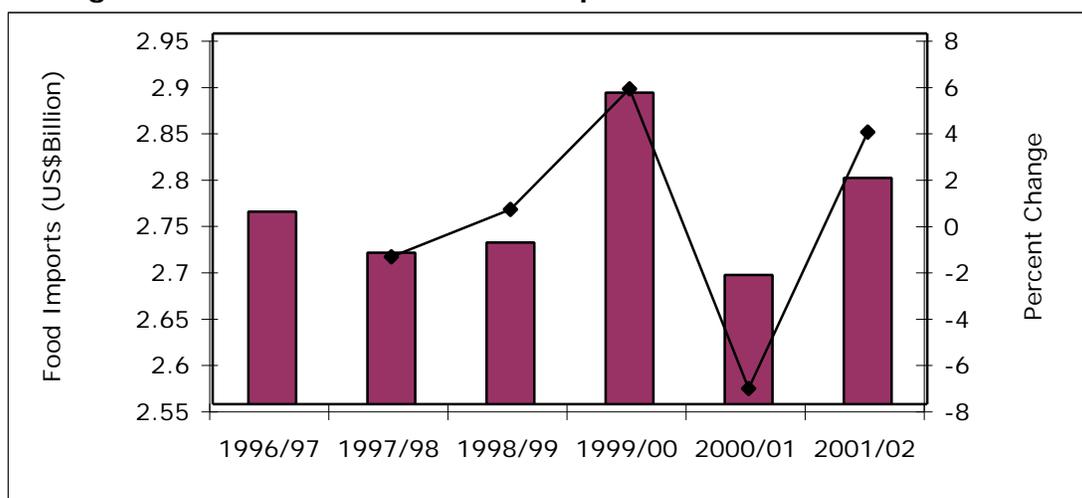
Value of Imported Food vs Domestic Products

- The total value of imports for the food and beverage sector in 2001/2002 was US\$2.8 billion. This figure includes products at three different levels of transformation, including minimally transformed (indicates basic refining or manufacturing processes), moderately

transformed (implies that manufacturing processes have processed or refined raw material into a recognizable product) and elaborately transformed (indicates commodities have undergone processes to create an end use product). Of the total value of Australia's food imports, U.S. imports contributed US\$294 million in 1996, increasing to US\$338 million in 1998 and falling to US\$298 million in 2000.

- In Australian dollars, food imports have risen (in value) for the last six years and have a five-year average growth of 7.9%. However, when converted to U.S. dollars (Figure 2), peaks and troughs appear and the five-year average import growth is reduced to <1%.
- Available Australian import statistics do not provide the level of information required to directly compare the dollar value of imported food versus domestic products for the HRI sector.

Figure 2: Total Australian Food Imports from 1995-96 to 2001-02



- Australian inputs (before value adding processes) into the food and beverage manufacturing sector have been estimated for each sub-sector and are summarized in Table 4. Local inputs have been estimated by manipulating the latest Australian Bureau of Statistics (ABS) statistics and are provided as indicative estimates only.

Table 4: Estimated Value of Domestic Inputs (2001/02)

Substantially Transformed	Local Inputs (US\$Mil)
Meat	4,392
Seafood	3,019
Dairy	986
Fruit and Vegetables	588
Oil and fat	1,091
Flour mill and cereal	534
Bakery products	2,208
Other food	2,482
Beverage and malt	15,299
TOTAL	30,599

Macro-Economic Factors and Key Demand Drivers

The key demand drivers and macro economic factors affecting the food service sector include:

- **Trend towards healthy food choices:** Many Australians are concerned about their health, and their commitment to exercise and diet food is driving changes in food eating habits. With growing obesity and health conscious consumers, the demand for low fat alternatives is rising. There are two types of consumer in the market for low fat alternatives: those that will eat low fat no matter how it tastes; and, those that want to eat low fat but will not compromise taste. Most segments have responded to the diet interest, notably in dairy produce, including cheese, margarine, milk, yogurt and small goods.
- **Café and coffee culture:** There has been a shift in demand towards a faster, more casual style of dining experience over the past two decades, with an increasing emphasis on coffee and snacks. The number of registered cafés and restaurants has more than doubled in the past decade to 28,925 outlets. The turnover in 2000/01 was estimated to be A\$9.0 billion compared with A\$3.7 billion a decade ago. Australians drank \$225 million worth of café lattes last year, which is an increase of 50% in two years. Cafés are showing up in bookshops, hardware stores, nurseries and supermarkets.
- **Menu diversification & ethnic diversity influencing food choices:** Multiculturalism has a major impact on the food service industry in Australia, with around 75% of Australians eating ethnic foods regularly. The proportion of restaurants in each cuisine category is: modern Australian 36%, Chinese 15%, seafood 9%, Italian 9, Thai 4%, French 2%, Japanese 2%, Greek 1% and other 21%. With many Australians having traveled overseas, there is also demand for local restaurants to provide foods that are enjoyed overseas.
- **Breakfast dining:** There is a growing trend towards breakfast dining. Some of the major hotel chains are encouraging the corporate market to begin conducting breakfast meetings. An important part of the breakfast meal is espresso coffee and fresh teas.
- **Internet:** Food service companies, including caterers, home-service, food distributors and specialist manufacturers are using the Internet to increase sales and improve distribution. Many of the Internet food retailers are seeing themselves becoming a 'one-stop-shop', where consumers are able to purchase everything they need on line, in a time- and location-convenient manner.

Advantages and Challenges Facing U.S. Products in Australia

Advantages	Challenges
Generally, there are opportunities in food retail for innovative products, particularly those that are healthy, flavorful and reduce preparation time.	Australia produces a diverse range of agricultural products.
The conventions market is continuing to expand with opportunities for caterer suppliers. This growth is due in part to increased exposure from the Sydney Olympics.	As most products are available in Australia, U.S. products have to compete on price in an extremely competitive market.
Australian consumers are experimental and desire authentic, restaurant quality taste sensations. Innovative products that make it easier for food service operators have potential.	Australian chains and restaurants are likely to buy fresh produce locally as it is viewed as fresher by consumers.
The Australian dollar has appreciated against the U.S. dollar by approximately 35 percent over the past year meaning that imports from the U.S. are now much more affordable than in the recent past.	The recent expansion of the café and restaurant sub-sector at the expense of the Takeaway food sub-sector creates challenges for U.S. exporters, as it increases the demand for fresh produce, reducing the demand for processed inputs and ingredients.
Australians generally have a high disposable income, leading to increased expenditure on 'luxuries', including eating out more often.	U.S. suppliers have to compete with the popularity and alternative sources of Italian, Thai, Indian, Chinese, Japanese and European cuisine.
Tariffs on imported food products are low – generally 0-5%. With the enactment of a Free Trade Agreement between Australia and the U.S. these would all drop to zero.	

SECTION 2: ROAD MAP FOR MARKET ENTRY

A: Entry Strategy

Market Access for Imported Products

- Establish local representation through an agent/distributor.
- Target distributors and wholesalers that stock a wide range of items, as the food service market is looking to 'one-stop-shop' distributors who can offer a range of dry and frozen goods.
- Different food service suppliers should be targeted, depending on the nature of your product, i.e. whether it is geared towards the institutional, restaurant or hotel/resort sub-sectors. For example:
 - larger wholesalers are dominant in the institutional sector (except for non-boarding schools);
 - smaller suppliers appear to be dependent on trade from restaurants;
 - coffee shops, clubs and hotels, fast food and restaurant chains rely mostly on the large wholesalers and distributors; and
 - function and contract caterers appear to use suppliers of all sizes.
- Use Australian foodservice supplier Internet sites to locate specialist/generalist distributors. For example www.nafda.com.au provides industry links to www.supplysite.com and www.foodservice.net.au and contact details for its members. Many of the linked sites are international, allowing U.S. suppliers to advertise their products to Australian buyers, as well as to the rest of the world. Also take a look at www.ausfoodnews.com.au/foodcomp.htm; and www.ausfoodnews.com.au/foodserv.htm
- Build brand awareness through advertising and promotion.
- Educate potential customers of any industry product endorsements your products may have received. Australian consumers respond positively to a quality product endorsement. If your product has won awards in the U.S. helps ensure adequate advertising. Also if restaurants/caterers you supply have won awards, ensure your products include educational material advertising successes.
- Exhibit at trade fairs in Australia (see Section V of this report).
- Make it easier for distributors/caterers to use your products by packaging products into menu suggestions that target specific end users, for example school canteens.
- Ensure your product meets the food safety requirements of each sector (see Section V).
- Register with the School Canteen Association in the relevant state (see Section V). Products must meet the Federation of Canteens in Schools (FOCIS) standards on nutrient criteria and be registered with FOCIS. Also register with the Australian National Heart Foundation where possible. Registered products should include these industry logos in their promotion.

Competitive Advantage of U.S. products

- Due to the large U.S. market, U.S. manufacturers are able to develop a range of products far beyond that which can be achieved in Australia. This enables U.S. exporters to deliver innovative product lines that are otherwise not available from Australian manufacturers.
- World-class technology and advanced manufacturing expertise creates an advantage for U.S. exporters.

Receptivity of Distribution Trade

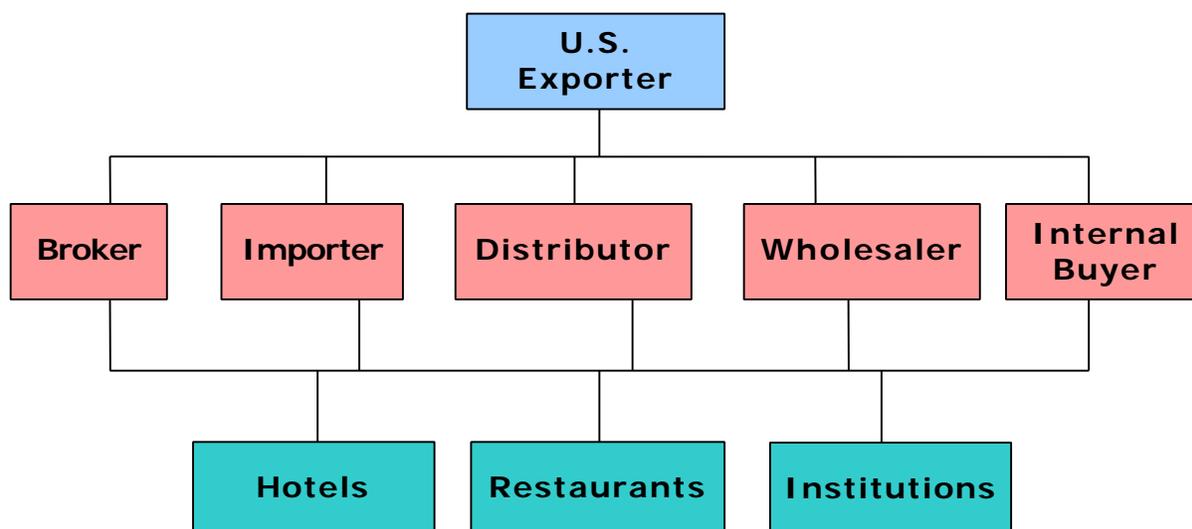
- The distribution services sector accounts for a large share of economic activity. In Australia, wholesale and retailing services contribute 10% to GDP and make up approximately 20% of full-time employment. The sector is essentially a domestic one; Australian wholesalers and retailers undertake little significant international trade. However, this may change as business processes and supply chains are transformed by globalization and new technologies.
- Within the Australian food sector there are many companies importing products. Some are highly specialized for a particular type of ingredient, for example olive oil or nuts; however, others import a wide range of goods from food additives to spices.

Ability or Willingness of U.S. Exporters to Meet Market Requirements

- The Australian market is very 'Americanized', with most food categories compatible with Australian tastes. There are, therefore, many opportunities for U.S. exports in Australia.
- It is often helpful to engage a broker that knows the market, knows what retailers need by way of presentation documents, and, generally has high-level trade relationships. Other services offered by brokers can include some or all of the following: warehousing, distribution, and assistance with import and quarantine paperwork. The Association of Sales and Marketing Companies Australasia is the peak association for brokers and distributors (www.asmca.com.au).
- In addition to meeting market requirements, all food imported into Australia must comply with the requirements of the Quarantine Act 1908 as applicable (for animal and plant disease control) and the requirements of the Imported Food Control Act 1992 for matters relating to food safety. To satisfy quarantine requirements it may be necessary for importers of certain foods to obtain a permit to import quarantine material. This is particularly true for fresh fruit and vegetables, or food that may contain milk, egg, meat or other animal products as an ingredient. As well as needing an import permit, some products must meet additional requirements before importation. To obtain up to date information about import conditions for products refer to the ICON database maintained by AQIS (<http://www.aqis.gov.au>).
- Products also need to meet with Australia's labeling requirements. See Section V of this report for further information on labeling laws.

B: Market Structure

The food service sector primarily uses five different channels to purchase food and beverages. The structure of the Australian food service distribution network can be summarized by the flow chart as shown below.



The following text briefly describes each channel.

- Food brokers supply commercial users on a daily basis for some specialty products. For example, Bundaberg Sugar Food Service Division uses food brokers to distribute their products to a wide range of outlets, including snack bars, bakeries, restaurants, government institutions, airlines, hotel and catering services.
- For products not available in Australia, companies either engage and negotiate directly with overseas manufacturers or purchase through an importer. For example, Australia has more than 16 different Spanish olive oil importers bringing more than 20 different brands into the country.
- Independent distributors dominate the food service network in Australia. The industry is fragmented and is represented by hundreds of distributors nationally who service thousands of outlets. The fragmented nature of the industry means food service operators need to deal with a large number of distributors and wholesalers to meet their requirements.
- Some small distributors have banded together to form buying groups, such as Countrywide, in order to compete more effectively. Countrywide negotiates with manufacturers on behalf of their members to give independent distributors better buying power. They do not, however, influence the products purchased by distributors.
- Many wholesalers specialize in a particular food item, e.g. seafood, fresh produce, finger food, etc., and still remain a popular avenue to purchase goods. Some wholesalers also provide distribution services, although these are often restricted to defined areas.
- Most large food producers or manufacturers still distribute a large proportion of their own products, particularly bread, cold beverages, dairy products and fresh/frozen meats, directly to the foodservice sector. Coca-Cola, Arnott's and Goodman Fielder Foodservices maintain their own in-house distribution network.
- For many large companies, there are in-house departments that source and purchase food products. These departments usually use a range of purchasing agents and also deal directly with manufacturers. In this situation, potential U.S. exporters would need to contact these companies and pitch new products directly to the company.
- The primary difference between local products versus imported products is the process of clearing imported goods through customs. This process can sometimes be delayed by incorrect paperwork and shipping delays. To assist with this process, many companies use import brokers who are skilled in this area.

- For some major franchises groups, an independent purchasing company sources products under direction of franchises.

C: Sub-Sector Profiles

Abbreviations used in this section for Australia's states and territories:

NT = Northern Territory; SA = South Australia; WA = Western Australia; VIC = Victoria; QLD = Queensland; NSW = New South Wales; TAS = Tasmania; ACT = Australian Capital Territory. NZ = New Zealand.

Hotels and Resorts

Company information for major hotels and resorts within Australia is summarized in Table 5. The 'parent' company is listed as the company name. Total sales and revenue is reported for the parent company and may include revenue generated from activities other than that pertaining to the hotels and resorts.

Table 5: Hotels and Resorts Company Profiles

Company Name	Total Revenue (\$Mil) (includes sales & other revenue)	Outlet Name & (Number of Outlets)	Location	Purchasing Agent(s)
AAPC Ltd (operates in Australia under business name Accor)	\$196 (2002)	Sofitel (3), Novotel (20 includes NZ), Mercure (>45 includes NZ), All Seasons, ibis (9), Formule 1 Hotels (13).	Some hotel brands are national and others are not.	Work directly with manufacturers and preferred suppliers and distributors. No import agents.
Grand Hotel Group	\$100 (year ending June 2003)	Hyatt hotels (4) Chifley hotels (5) Country Comfort hotels (12)	National	Currently changing their purchasing system. In the future they will use a third party to do all their buying.
Intercontinental Hotel Group	N/A	Intercontinental, Crowne Plaza, Holiday Inn, Centra and Park Royal (30).	National	Suppliers, wholesalers and manufacturers.
Tourism Asset Holdings Ltd	\$41 (2002)	Ibis, Novotel, Mercure (total 26).	NSW, QLD, VIC, WA	Work directly with manufacturers and preferred suppliers and distributors. No import agents.
Hilton Hotels of Australia Ltd	\$47 (2002)	Hilton (8)	NSW, WA, TAS, SA QLD, VIC,	Wholesaler, distributor, importer.
Mirvac Ltd	\$745 (year ending June 2003)	Quay Grand, Como, Sebel, Sebel Resorts, Sydney Marriott, Plaza Suites (total 22).	NSW, QLD, WA, VIC	N/A
Thakral Holdings Ltd.	\$162 (year ending June 2003)	All Seasons Premier Menzies, Novotel, Grand Mercure (total 10 Hotels)	NSW, VIC, QLD, SA and NT	Work directly with manufacturers and preferred suppliers and distributors.

- Primary customer base includes traveling professionals and tourists, both international and domestic (including families).
- In 2001, the hotel and resort segment was valued at US\$1.03 billion. The sector experienced zero growth from 2000 to 2001, largely due to a decrease in consumer confidence and a reduction in the number of international travelers (the Olympics, held in Sydney in 2000, would also partially account for this reduction in international travelers in 2001).
- Future growth trends include:
 - Hotels and resorts are increasing their presence in the growing business convention and function sector. Australia, and Sydney in particular, is a popular destination for international conventions, suggesting an expanding market.
 - The market for breakfast is growing in Australia. Offerings include continental breakfasts, fruit platters, hash browns, pancakes with maple syrup, sausages, etc.
- Hotel chains and independent hotels generally source food that is locally produced.
- Australian products are more prevalent than imports and U.S. products are not common.

Restaurants - Fast Food

Company information for fast food restaurants within Australia is summarized in Table 6. The 'parent' company is listed as the company name. Total sales and revenue is reported for the parent company and may include revenue generated from activities other than that from the sale of food and beverages.

Table 6: Restaurants (fast food) Company Profiles

Company Name	Sales (\$Mil)	Outlet Name & (Number of Outlets)	Location	Purchasing Agent Type
McDonald's Australia	\$979 (2002)	McDonalds (725)	National	F J Walker Distributor
Yum Brands Inc	\$256	KFC (450), Pizza Hut (350) and Taco Bell (8)	KFC and Pizza Hut are national Taco Bell Sydney only.	Internal department that works directly with manufacturers. A third party distributor is engaged to deliver goods.
Domino's Pizza International, Inc. (U.S.)	N/A	Domino's Pizza (257)	NSW, ACT, Qld, WA, TAS, NT	N/A
Doctor's Associates Inc.	NA	Subway	National	Wholesaler/ distributor. An independent purchasing company sources products under direction of franchises.
Burger King Corporation	NA	Hungry Jacks (300)	National	Internal buyer sources products locally and overseas.
Wendy's Supa Sundaes Ltd	NA	Wendy's (300 across NZ and Australia)	National	Internal buyer works with manufacturers to source products.

Australian Fast Food Corporation	\$41 (year ending June 2002)	Red Rooster (261 company owned and 52 franchise owned)	National	Sources products through suppliers/distributors. Overseas product sourced via companies with a local affiliation.
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- Fast food restaurants are the most popular place for buying a snack or a full meal, particularly for families with children under 18.
- Retail sales of fast food increased by 5% in 2002 to reach US\$3.8 billion.
- On average, growth for the fast food sector is expected to reach 1.5% during the period 2003-2005; however, this will be 5.7% per annum for the fast food chains.
- The fast food sub-sector is facing competition from a developing up-market convenience food sector. Research shows that consumers have shifted some of their food budget from fast food to prepared products, either those ready to heat or requiring cooking.
- There has been an increased demand for washed salad mixes, pasta sauces, fresh pasta and partly prepared meat products and raw stir fries which is further confirming consumers concern for a healthy diet.

Restaurants - Family Style/Mid-Level

Company information for family or mid-level food restaurants within Australia is summarized in Table 7. The 'parent' company is listed as the company name. Total sales and revenue information for this sector is not available and so has not been included in the table.

Table 7: Restaurants (Family Style/Mid-Level) Company Profiles

Company Name	Outlet Name & (Number of Outlets)	Location	Purchasing Agent Type
Collins Food Group (subsidiary of World Wide Restaurant Concepts)	Sizzler (28)	QLD, NSW, ACT, WA	Wholesale. Internal buyer negotiates directly with large suppliers; products are stored in company warehouses and then distributed. Mainly deal with Australian products.
Montezuma's Mesa Australia Pty. Ltd	Montezuma's (Mexican)	NSW, QLD, VIC, SA	Wholesalers/distributor. Fruit and vegetables are purchased from local fruit stores. Only import exotic beers.
Taco Bill Mexican Restaurant	Taco Bill Mexican Restaurant (21)	National	Distributor for canned, dry and frozen goods; suppliers for fresh and other goods sourced through an importer.
Hog's Breath Cafe (Australia) Pty Ltd	Hog's Breath Café (41)	National	Franchises purchase individually except for beef and fries, which are on national contracts. Franchises use wholesalers. No imports.

- Young, affluent people usually patronize restaurants.
- Independent and franchise restaurants often deal with distributors and wholesalers and source product from fresh produce and meat markets. To tackle this market, targeting wholesalers and distributors will likely be more successful. Beverages and quality condiments are likely to be the most successful products.
- Consumers willing to pay more for quality products.
- Continuation of multicultural flavors dominating, reflecting the ethnicity of Australia.
- New ideas flowing from Asia and Europe, with the potential for trends in flavors from the U.S. to influence the sector.

Coffee Shops

Company information for coffee shops within Australia is summarized in Table 8. The 'parent' company is listed as the company name. Total sales and revenue for this sector is not available and so has not been included in the table.

Table 8: Coffee Shop Company Profiles

Company Name	Outlet Name, Type, & Number of Outlets	Location	Purchasing Agent Type
Donut King	Donut King (218)	National	N/A
Muffin Break	Muffin Break (140)	National	Negotiate directly with manufacturers and distributors. No imports.
Michelle's Patisserie	Michel's Patisserie (150)	National	Importer, wholesaler, distributor, manufacturer.
The Coffee Club	The Coffee Club (80)	National (no TAS)	Wholesaler/distributor. An independent purchasing company does sourcing of products under direction of franchises.
Coffee DCM Donuts (local franchise)	Coffee DCM Donuts (28)	NSW, VIC, QLD	N/A
Starbucks Coffee Company	Starbucks (43)	NSW, ACT, QLD	N/A
Gloria Jeans Coffee	Gloria Jeans (140)	National	Prefer to work directly with manufacturers. They have their own warehouses and distribution network.

- Coffee shops operate in street-front, shopping centers and tourist locations. Coffee shops in the city center rely heavily on people working within a small radius of the shop front and include business professionals and shoppers.
- Franchise stores continue to increase store numbers and coverage.
- Coffee culture is very popular in Australia.
- Annual coffee consumption in Australia is increasing and is now at approximately 2.4 kg per person.

Specialty shops

Company information for specialty shops within Australia is summarized in Table 9. The 'parent' company is listed as the company name. Total sales and revenue is reported for the parent company and may include revenue generated from activities other than food and beverages.

Table 9: Specialty Shops Company Profiles

Company Name	Sales (US\$Mil)	Outlet Name & (Number of Outlets)	Location	Purchasing Agent Type
Bakers Delight Holdings Ltd	\$174 (2002)	Bakers Delight (630)	National	N/A
Délicrance Asia Ltd owned by PAMA (U.S.)	\$13 (2002)	Delifrance (22)	NSW, VIC, SA, ACT	N/A
Banjo's Bakehouse Corporation	N/A	Banjo's Bakehouse (35)	TAS, VIC, Qld, NSW	Distributors and import agents.
Brumby's Bakeries Limited	\$4	Brumby's (257)	National	All franchises deal with two suppliers who also distribute product to stores. No imports.
Baskin-Robbins Incorporated	N/A	Baskin Robins (70)	N/A	Deal with a distributor. All ice cream is imported from Canada.
Royal Copenhagen Ice Cream Cone Company Pty Ltd	N/A	Royal Copenhagen Ice cream (24)	N/A	Wholesalers and distributors.
New Zealand Natural Pty Limited	N/A	New Zealand Natural (71)	National (except TAS)	N/A

- Specialty shops operate in street-front, shopping center locations and tourist locations. Customers include tourists and local patrons.
- Bakers Delight, Australasia's largest bakery franchise, opened its 600th bakery in November 2002 with plans to open another 100 stores by the end of 2003. Roy Morgan Research estimates that Bakers Delight has a 13.3% market share of an US\$1.3 billion market in Australia and 8.5% share of a US\$326.3 million market in New Zealand, and growing. Total sales from franchisees in Australia and New Zealand have grown to over US\$184 million per annum.
- A large number of ice cream retail chains are planning to increase store numbers, a move that will have a significant impact on Australia's retail mix. Baskin-Robbins currently has approximately 70 stores and plans to increase this figure to 100 by 2005. Wendy's intends to expand its network of 270 stores to 350 by 2005. The American chain Goodberrys Creamery announced intentions to expand from the two existing stores in Canberra to 250 franchised stores nationally.
- Both Gelatissimo and Gelatomessina (two Italian-style gelato stores) are also in expansion mode due to the increasing popularity of gelato.

Institutional

The Institutional sub-sector includes business cafeterias, military, schools/universities, hospitals, nursing/retirement homes, function catering (sporting, entertainment, conventions, Olympics) and Internet home delivery services. The companies listed in the following table are the primary suppliers to these sub-sectors and the foodservice sector as a whole.

Table 10: Institutional Catering Company Profiles

Company Name	Sales (US\$Mil)	Type of Outlet Supplied	Location	Purchasing Agent Type
Spotless Catering (caterer)	\$967.5 (year ending June 2003)	Conventions, business and industry, tourism and leisure facilities, educational facilities, defense and government	National	Local wholesaler/ Distributor Import Agent Direct
Nestle Foodservices	N/A	Business cafeterias, military, schools/universities, hospitals, nursing/retirement homes, function catering (sporting, entertainment and convention centers.	National	Local wholesaler/ Distributor Import Agent Direct
PFD Food Services (distributor)	\$262 (year ending June 2002)	45 distribution centers service supplying hotels, restaurants, cafes and fast food outlets.	National (except WA & NT)	Manufacturers (direct), wholesaler, distributor and import agent.
NAFDA (buying group, distributor)	N/A	54 distribution centers service nursing/retirement homes, hospitals, fast-food chains and hotels.	National	Manufacturers (direct), wholesaler, distributor and import agent.
Compass Group (parent company of Eurest)	N/A	Operates over 500 sites including corporate on-site catering, retirement villages, nursing homes, hospitals, educational institutions, defense, restaurants, coffee lounges, airports and events.	National	Local wholesaler/ Distributor Import Agent Direct
Bidvest Australia Limited	N/A	Supplies and distributes to hospitals, clubs, hotels and motels, restaurants, fast food takeaways, service station centers & deli's, schools & universities, contract caterers, defense, correctional centers, airlines and ship providers.	National	Local wholesaler/ Distributor Import Agent Direct
Valcorp Fine Foods Pty Ltd	Approx. AU\$105	Retail outlets and function caterers, hotels, restaurants and cafes.	National	Importer and distributor

- Institutional food outlets cover a broad spectrum of venues and include a diverse range of consumers across all age groups and socio-economic backgrounds.
- The institutional sector in 2001 was valued at US\$1.9 billion (in sales).

- Australia has an aging population, therefore opportunities in the nursing home and retirement care market will continue to grow.
- With obesity levels rising in Australia, there are growing concerns about the diets of children. Canteens favor healthy and inexpensive products.
- The special event catering industry is highly competitive and menu management systems have been implemented by most catering firms. Portion and quality control are important factors allowing control from both a quality and cost perspective. Opportunities could open for U.S. suppliers of innovative portion controlled products (for example biscuits, cereals and spreads).
- As the level of awareness and knowledge of food continues to increase, so does the need for caterers to be able to provide meals for a wide variety of special dietary considerations.

SECTION III: COMPETITION

Net imports for the ten major processed food types, as outlined in Section II, and key advantages and disadvantages of locally produced verses imported products are outlined in Table 11. The competitive situation, with respect to major supply sources, facing U.S. suppliers is summarized with respect to the main import sources, as data is not available on the total local production for each category.

The level of information available on each Customs Tariff Code restricts the analysis below. The primary constraint is imports are recorded as food type (for example 'nuts fresh or dried') and not their end use (for example further processing, snack food market etc). Details of which Customs Tariff Codes have been included in each category are documented to assist with the interpretation of Table 11. Codes have been assigned to each food category to the best of our ability; however, these results should be used as a guide only. For more information about the type of products included in each code, please refer to the Australian Customs Service website via the following link:
http://www.customs.gov.au/site/index.cfm?nav_id=670&area_id=5.

For seven of the 12 categories in Table 11, New Zealand is the major supply source of imports and for three of the remaining categories is in the top three. This is largely the result of the Australian-New Zealand Closer Economic Relationship Trade Agreement (ANZCERTA), a bilateral trade agreement, which exists between the two countries. The ANZCERTA has greatly contributed to the trade relationship between the two countries.

Table 11: Competitive Situation Facing U.S. Imports in the Food Service Sector

Product Category	Major Supply Source of Imports	Strengths of Key Supply Countries	Advantages & Disadvantages of Local Suppliers
Red meat¹ Net imports: 1,204 tons US\$2.6 million	New Zealand 74% Australia 14% U.S. 11%	<ul style="list-style-type: none"> ▪ NZ Trade Agreements. 	<ul style="list-style-type: none"> ▪ Australia is the world's largest beef exporter and one of the largest lamb and mutton exporters. ▪ Pork imports are large and growing ▪ Import conditions are strict
Poultry² Net imports: 904 tons US\$2.1 million	New Zealand 46% U.S. 17% Croatia 12% Slovakia 7%	<ul style="list-style-type: none"> ▪ NZ Trade Agreements ▪ NZ and U.S. are able to meet and satisfy tight regulations for import. 	<ul style="list-style-type: none"> ▪ Uncooked Poultry imports are banned. ▪ Import conditions for cooked poultry products are strict.
Fish and Seafood³ Net imports: 91,715 tons US\$318 million	New Zealand 31% Thailand 9% South Africa 7% China 7%	<ul style="list-style-type: none"> ▪ Half the quantities of imported seafood come from just two countries — New Zealand and Thailand. ▪ The quantity of chilled fish imported has grown 30% in just four years. ▪ Australians are increasingly willing to experiment with various food types and preparations, creating a market for species and products that are unavailable locally. 	<ul style="list-style-type: none"> ▪ Imported seafood products now provide more than 60% of seafood sold in Australia. ▪ Consumption of imported seafood has reached 140,000 tons a year or 50% more than levels of 10 years ago, with an industry value of about US\$544 million. ▪ Australian fisheries are unable to meet demand for some products.

<p>Dairy⁴</p> <p>Net imports: 65,476 tons</p> <p>US\$149 million</p>	<p>New Zealand 81%</p> <p>Italy 3%</p>	<ul style="list-style-type: none"> ▪ NZ Trade Agreements ▪ NZ brand recognition and patronage with NZ owned brands representing approx. 17.1% market share. 	<ul style="list-style-type: none"> ▪ Australian products are widely regarded as synonymous with quality and variety. ▪ Comparative price advantages and safety issues further assist the case for local and New Zealand product.
<p>Prepared Fruits & Vegetables⁵</p> <p>Net imports: 99,177 tons</p> <p>US\$134 million</p>	<p>New Zealand 27%</p> <p>U.S. 24%</p> <p>Turkey 16%</p>	<ul style="list-style-type: none"> ▪ NZ Trade Agreements. ▪ NZ has a clean/green image. ▪ Close proximity to NZ. ▪ Large population mix in Australia and some people desire foods from home. 	<ul style="list-style-type: none"> ▪ Many import bans exist for fresh fruit and vegetable. ▪ Supply chain favors local-grown fruit and vegetables with respect to fresh ingredients. ▪ Counter-cyclical advantage for Northern Hemisphere suppliers of fresh products
<p>Beverages⁶</p> <p>Net imports: 136,796 tons</p> <p>US\$371 million</p>	<p>UK 23%</p> <p>New Zealand and U.S. 15%</p> <p>France 13%</p>	<ul style="list-style-type: none"> ▪ NZ Trade Agreements 	<ul style="list-style-type: none"> ▪ Coca Cola Amatil holds nearly 60% of the market share.
<p>Snack Foods⁷</p> <p>Net imports: 42,075 tons</p> <p>US\$130 million</p>	<p>New Zealand 21%</p> <p>U.S. 8%</p> <p>UK 7%</p> <p>Spain 7%</p>	<ul style="list-style-type: none"> ▪ NZ Trade Agreements. ▪ Close proximity and therefore reduced transaction costs ▪ Brand recognition. 	<ul style="list-style-type: none"> ▪ Many U.S. branded products are made in Australia. ▪ Australia processing plants have access to a large range of raw materials.
<p>Breakfast Cereals⁸</p> <p>Net imports: 5,175 tons</p> <p>US\$8 million</p>	<p>New Zealand 31%</p> <p>U.S. 23%</p> <p>Canada 11%</p> <p>Poland 10%</p>	<ul style="list-style-type: none"> ▪ NZ Trade Agreements. ▪ U.S. - Kellogg's holds nearly 50% of the grocery value. 	<ul style="list-style-type: none"> ▪ Most Kellogg's products sold in Australia are made in Australia.
<p>Eggs and Egg Products</p> <p>Net imports: 23,062 tons</p> <p>US\$632,774</p>	<p>Thailand 71%</p> <p>UK 13%</p> <p>U.S. 6%</p>	<ul style="list-style-type: none"> ▪ Thailand - competitive export prices for eggs ▪ Strong and growing egg export market. ▪ Close proximity benefits transporting of perishable goods. 	<ul style="list-style-type: none"> ▪ Most imports are banned. ▪ Many of the suppliers are cooperative-based farmer groups. ▪ Private label represents nearly 40% of the value of the market segment. ▪ Limited shelf life.
<p>Nuts</p> <p>Net imports: 29,062 tons</p> <p>US\$66 million</p>	<p>Vietnam 24%</p> <p>Philippines 17%</p> <p>NCD 13%</p> <p>Indonesia 12%</p> <p>U.S. 10%</p>	<ul style="list-style-type: none"> ▪ Vietnam is the second largest cashew exporter in the world. ▪ Efficient producer with yields generally higher than in competing countries. ▪ Processing is competitive with low labor costs. 	<ul style="list-style-type: none"> ▪ The climate in Australia favorable for producing many different types of nuts.

Infant Products⁹ Net Imports: 5,068 tons US\$27.4 million	Ireland 49% New Zealand 30% U.S. 17%	<ul style="list-style-type: none"> ▪ U.S. brand Heinz Watties holds 52% of the grocery value. ▪ Well-established and respected brand names dominate the segment and this segment is reportedly hard to break into. 	<ul style="list-style-type: none"> ▪ Well-established Australian brand names such as Golden Circle are branching out into baby food.
Pet Food Net imports: 40,725 tons US\$46 million	Thailand 48% U.S. 32% New Zealand 18%	<ul style="list-style-type: none"> ▪ Competitive export prices ▪ Large number of U.S. brands on the market (approximately 66% of the grocery value belongs to U.S.-owned brands). 	<ul style="list-style-type: none"> ▪ American owned companies (such as Uncle Bens) produce in Australia from nearly all Australian/New Zealand ingredients.

1. Red Meat products include Custom Tariff Codes 0201, 0202, 0204, 0206, 0207, 0208 and 0210.
2. Poultry products include Custom Tariff Code 1602.3 (Prepared or preserved poultry meat).
3. Fish and Seafood products include Custom Tariff Codes 0302, 0303, 0304, 0305, 0306 and 0307.
4. Dairy products include Custom Tariff Codes 0401, 0402, 0403, 0404, 0405 and 0406.
5. Prepared Fruit and Vegetable products includes Custom Tariff Codes 0703, 0704, 0706, 0707, 0708, 0709, 0710, 0712, 0713 and 0714.
6. Beverage products include Custom Tariff Codes 2201, 2202, 2009, 2203, 2204, 2205, 2206 and 2208.
7. Snack Food products include Custom Tariff Codes 1704 (sugar confectionary not containing cocoa) and 1806 (chocolate and other food preparation containing cocoa).
8. Breakfast cereal products include Custom Tariff Code 1904 (prepared foods obtained by the swelling or roasting of cereals or cereal products).
9. Infant products include Custom Tariff Code 1901.10.00 (Preparations for infant use, put up for retail sale).

SECTION IV: BEST PRODUCT PROSPECTS

A. Products Present in the Market Which Have Good Sales Potential

The products presented in Table 12 are currently available in the Australian foodservice sector in large quantities. A significant proportion of these products are imports that may provide U.S. exporters with some opportunities.

Table 12: Products Present in the Market, Which Have Good Sales Potential

Product	2002 Market share (\$Mil)	2002 Imports (\$Mil & Tonnes)	5-yr Avg Annual Import Growth	Import Tariff Rate	Key Constraints Over Market Development	Market Attractiveness for the U.S.
Tea	N/A	52.1	9%	Free	<ul style="list-style-type: none"> ▪ U.S. supplied Australia with 1% by quantity, less than 1% by value of tea imports in 2002. ▪ Large variation in quality of tea imports and price paid. For example Indonesian imports represent 30% by quantity but only 16% by value however UK represents 6% by quantity of imports but is 23% of the value. 	<ul style="list-style-type: none"> ▪ The antioxidant benefit of tea is increasing its popularity as a healthy beverage. ▪ Customers are demanding variety with high quality, flavor and aroma. ▪ Tea is a profitable menu item for Australian foodservice operators. ▪ Small proportion of Australian grown tea is consumed in Australia.
Coffee	\$544 ¹	\$55.5 43,280	-14 ²	Free	<ul style="list-style-type: none"> ▪ Very competitive market. ▪ High consumer knowledge and branding very important. ▪ 26% by value (5% by quantity) of 2002 imports came from Italy. ▪ 39% by quantity (14% by value) of 2002 imports were from Vietnam. 	<ul style="list-style-type: none"> ▪ 62% of the population 14 years and over consume coffee. ▪ Coffee was one of the top five most popular beverages in 2002.

Spices	N/A	\$21.7	9%	Free	<ul style="list-style-type: none"> ▪ Most of the world's supply of spices is produced in developing countries. 	<ul style="list-style-type: none"> ▪ Many Australian spices (e.g. paprika) cannot compete competitively with imported products. ▪ Flavors from all over the world feature in Australian menus.
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1. Very difficult to accurately calculate the size of this market, as there is over 60 small roasters and a number of large contract roasters, plus dozens of imports (over 24 Italian brands imported alone). It is estimated foodservice is worth about AU\$500m wholesale.

2. The value of coffee imports has decreased each year from 1999 to 2002. However, the quantity of imports rose last year by 7%.

B: Products Not Present in Significant Quantities but Which Have Good Sales Potential

Products identified in this category include new innovative products that have recently been developed and currently heavily advertised in foodservice industry magazines and others foods (e.g. organic products and energy drinks) that by comparison to similar products on the market (e.g. other fresh fruit and vegetables and soft drinks), represent a small proportion of the market.

Table 13: Products Not Present in Significant Quantities but Which Have Good Sales Potential

Product	2002 Market share (\$Mil)	2002 Imports (\$Mil)	5-yr Avg Annual Import Growth	Import Tariff Rate	Key Constraints Over Market Development	Market Attractiveness for the U.S.
Specialty Rice	\$56.4	Total rice imports \$22.6	7%	Free	<ul style="list-style-type: none"> ▪ Australian rice segment dominated by local brand SunRice. 	<ul style="list-style-type: none"> ▪ New innovative rice products are coming onto the Australian market. ▪ "Clever Rice" is a new type of rice that has a higher cooking tolerance ensuring rice presents perfectly. ▪ Strongly marketed in the foodservice segment as a reliable and quick solution.

Organic	N/A ¹	N/A	N/A	N/A	<ul style="list-style-type: none"> ▪ Generally restaurants are not buying organics wholesale or in volume. Majority of customers are health food shops and smaller grocers. ▪ Organic prices are 30-80% above conventional prices. ▪ Difficulties with consistent supply to cope with restaurant menus that can last up to 3 months. 	<ul style="list-style-type: none"> ▪ In the past 4-5 years, the industry (including farming to the retail market), has grown 25%.
Energy Drinks	\$131 (2001)	N/A	N/A	N/A	<ul style="list-style-type: none"> ▪ In terms of volume, soft drink sales are larger as they are sold in quantities up to 2 liters, where energy drinks are limited to smaller sized bottles and cans. 	<ul style="list-style-type: none"> ▪ Major players include Red-Bull and Frucor (V). ▪ Consumers are now more aware of sports and energy drinks as a result of advertising campaigns, a wider availability, and the perceived health benefits linked to the drinks. ▪ In 2001 sales increased by 18% on previous year.
Single-serve snack foods	N/A	N/A	N/A	N/A	<ul style="list-style-type: none"> ▪ Uncle Toby's is one of Australia's best-known and most trusted brands. ▪ Arnott's and some Kraft products are manufactured in Australia. 	<ul style="list-style-type: none"> ▪ Very popular for biscuits, spreads, condiments and cereal packs. ▪ Kraft Foods advertising American products (Oreo) in Australia.

1. Retail sales of organic produce in Australia are estimated to have increased from \$28 million in 1990 to nearly \$200 million in 2003.

C: Products Not Present Because They Face Significant Barriers

Industry advice suggests that where products are not present in a market it is primarily because the distribution channel is not yet developed for a particular area, or demand for the product is not large enough to warrant supply. Generally everything required in Australia is available, so much so that Australia exports culturally specific products to originating countries (e.g. exporting Asian cuisine to Asia).

Products in this category include many fresh fruits and vegetables and poultry products, which are prohibited entry; meat and meat products and eggs, which have very strict import requirements.

U.S. exporters should use the Australian Quarantine and Inspection Service Import Conditions web site to check on the import conditions for various products-
http://www.aqis.gov.au/icon32/asp/ex_querycontent.asp

SECTION V: OTHER INFORMATION AND POST CONTACTS

Import Regulations

Information on Food Law and Policy in Australia can be obtained from the www.ausfoodnews.com.au website.

See the Australian Quarantine & Inspection Service import conditions (ICON) database to identify whether your product is prohibited entry to Australia.

http://www.aqis.gov.au/icon32/asp/ex_querycontent.asp

Australia's Food Labeling Regulations

In Australia, Food Standards Australia New Zealand (FSANZ) regulates the delivery of safe food. FSANZ is a bi-national independent statutory authority which develops food standards for composition, labeling and contaminants (including microbiological limits) applying to all foods produced or imported for sale in Australia and New Zealand. FSANZ operates under the Food Standards Australia New Zealand Act 1991.

The Foreign Agricultural Import Regulations and Standards (FAIRS) report from this office contains detailed information on the Food Standards Code and other food regulations. A copy of this report can be obtained by conducting a "AGR Number" (Option 3) search on the following page web page: <http://www.fas.usda.gov/scripts/attacherep/default.asp> for report number AS3028.

An Internet version of the code can be located on the FSANZ web site at: <http://www.foodstandards.gov.au/foodstandardscode/>

Industry Information

The **Association of Sales and Marketing Companies** - Australasia (incorporating the Australian Food Brokers Association) requires members to adopt assured quality practices. Members can be found on their web site at: <http://www.asmca.com.au>.

The Australian Food & Beverage Importers Association is the peak industry body for food import companies.

Food and Beverage Importers Association

181 Drummond St
Carlton Victoria 3053
Australia

Tel: +61-3-9639 3644

Fax: +61-3-9639 0638

Email: fbia@fbia.org.au

Web: <http://www.fbia.org.au/index.html>

The following information provides names of industry bodies and contact phone numbers for the school-catering sector.

NSW School Canteen Association (NSWSCA)Web: <http://www.healthy-kids.com.au/>

Tel: 61-2-9876 1300

Fax: 61-2-9876 1471

Queensland Association of School Tuck shops (QAST)

Tel: 61-7-3327 3310

Fax: 61-7-3327 3350

Western Australia School Canteen Association (WASCA)Web: <http://www.waschoolcanteens.org.au/>

Tel: 61-8-9244 1992

Fax: 61-8-9244 1989

Tasmania School Canteen Association (TSCA)Web: <http://www.tased.edu.au/tasonline/tsca/>

Fax: 61-3-6222 7252

ACT School Canteen Association (ACTSCA)

Tel: 61-2-6282 2158 or 61-2-6281 3763

Northern Territory School Canteen Association (NTSCA)

Tel: 61-8-8988 4426

Fax: 61-8-8988 4426

Trade Shows

Fine Food is the largest food industry show in Australia and incorporates the Supermarket and Hotel shows. The show gives buyers the chance to sample new products and talk directly to the suppliers. The new natural product section is expected to be a major draw card, with chefs and retailers discovering products that kind to the environment, kind to consumers and a big hit on the menu. In 2004, the show will be held at the Melbourne Convention and Exhibition Center from September 6-9. In 2005, the show will be held in Sydney. For further information please contact Australian Exhibition Services at the address below.

Timothy Collett, Show Director
Australian Exhibition Services Pty Ltd
Illoura Plaza, 424 St Kilda Road
Melbourne Victoria 3004
Australia

Tel: +61-3-9261 4500

Fax: +61-3-9261 4545

Email: food@ausexhibit.com.auWeb: <http://www.finefoodexpo.com.au>

Bibliography

The majority of company information was sourced from corporate websites. Details on sales and revenue was obtained via the following website: <http://www.seek.co.nz/if.asp?loc=ibis>. Additional company information was clarified by consultation with appropriate members of staff within the company.

Other resources include the following industry magazines:

- Australian Food & Beverage Industry Compendium 2001 and 2002 editions.
- Australian Hotelier (periodical).
- Foodservice News (periodical).
- Eatdrink (periodical).
- Hospitality (periodical)

Publications include:

- Australian Bureau of Statistics
- The Australian Foodservice Market 7th edition, BIS Shrapnel (2002)

Post Contact

Office of the Agricultural Counselor
U.S. Embassy
Moonah Place
Yarralumla ACT 2600
Australia
Tel: 61-2-6214-5854
Fax: 61-2-6273-1656
Email: AgCanberra@usda.gov